



Guide to Generative Thinking Board

Presented by: Julie Fink, MS, CFRE



Learning Outcomes

- Develop immediate action items around board composition, recruitment, orientation and education efforts
- Have a clear understanding of generative thinking and how this shift in thinking can have a direct impact on the overall effectiveness of the organization's board
- Hear excerpts from real conversations with CDO/ED and Board Chairs/Members



Problems about *performance* to
problems of creating *purpose*.



Generative

Capable of creating, producing or reproducing

- Generative Behavior - support oneself by supporting others
- Generative Learning - actively make sense of what is being taught
- Generative Communications - being reflective rather than reactive
- Generative Approach - different “outside of the box” solutions



A Generative Thinking Board

- A different view of organizations
- A different definition of leadership
- A different mindset
- A different role
- A different way of thinking
- A different notion of work
- A different way to do business



Why aren't more boards pursuing Generative Thinking?

- Lack of understanding of the organization
- Avoids participating in discussions when its not their area of knowledge
- Little personal accountability
- Individuals out of practice working with team
- New or unfamiliar voices unheard



What we are going to look at?

A few key factors were identified that may play a part in the boards ability to transition into generative thinking including:

- Composition
- Leadership
- Recruitment
- Orientation and Education



What way are we going to look at it?

- Literature review
- Examples of personal experience
- In-depth interviews with non-profit leadership
- Analysis
- Actions/Recommendations



Literature

Board Source. 2021. Leading with Intent: 2021 Index of Nonprofit Board Practices. *Board Source: Washington, D.C.*

Board Source. 2012. The Nonprofit Board Answer Book: A Practical Guide for Board Members and Chief Executives. *Jossey-Bass: San Francisco, CA.*

Chait, R.P., W.P. Ryan and B.E. Taylor. 2005. Governance as Leadership: Reframing the Work of Nonprofit Board. *John Wiley & Sons, Inc.: Hoboken, NJ.*

Stevens, S. 2008. Nonprofit Lifecycles: Stage-Based Wisdom for Nonprofit Capacity. *Stagewise Enterprises, Inc.: Scottsdale, AZ.*

Trower C. 2013. The Practitioner's Guide to Governance and Leadership: Building High Performing NonProfit Boards. *John Wiley & Sons, Inc.: San Francisco, CA.*



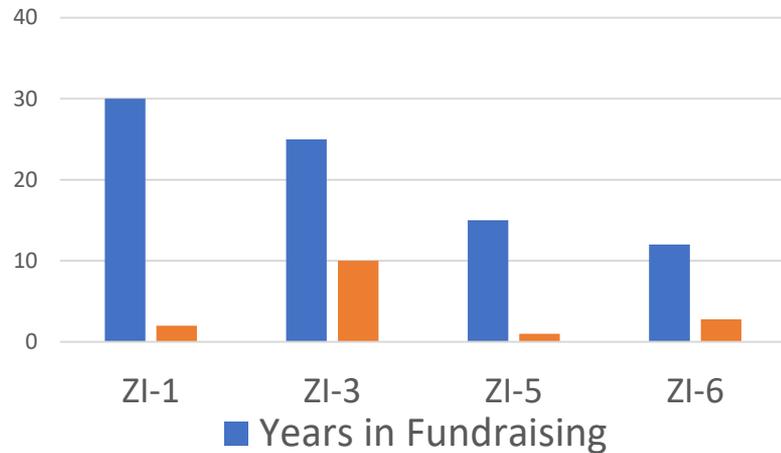
Personal Experience

- Masters Nonprofit Management & Philanthropy
- Certified Fundraising Executive (CFRE)
- 17-years in nonprofit
- Founder and president of nonprofit
- Led emerging leaders committee, planned giving council and business leadership council
- Board liaison 2 large healthcare organizations
- President of local AFP chapter
- Board member of national canine therapy nonprofit

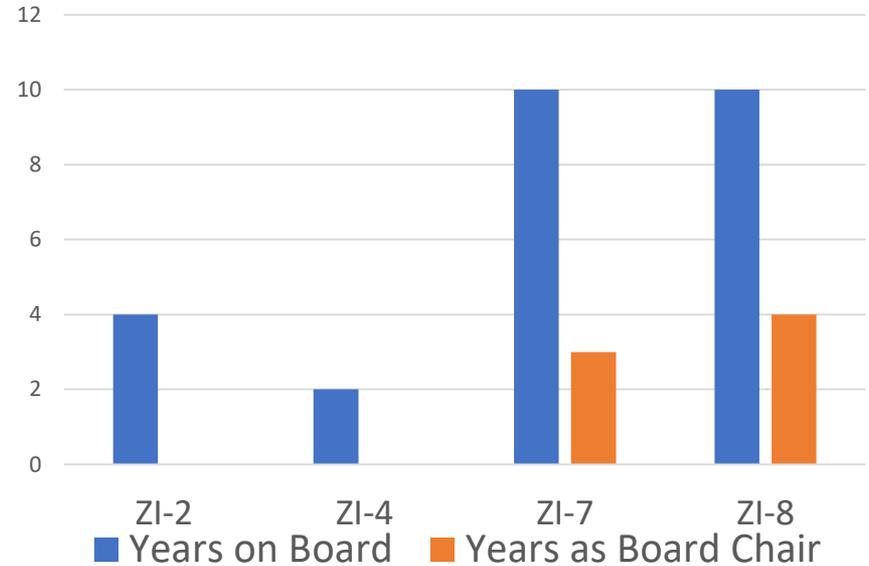


Interviews

Executive Leadership Experience

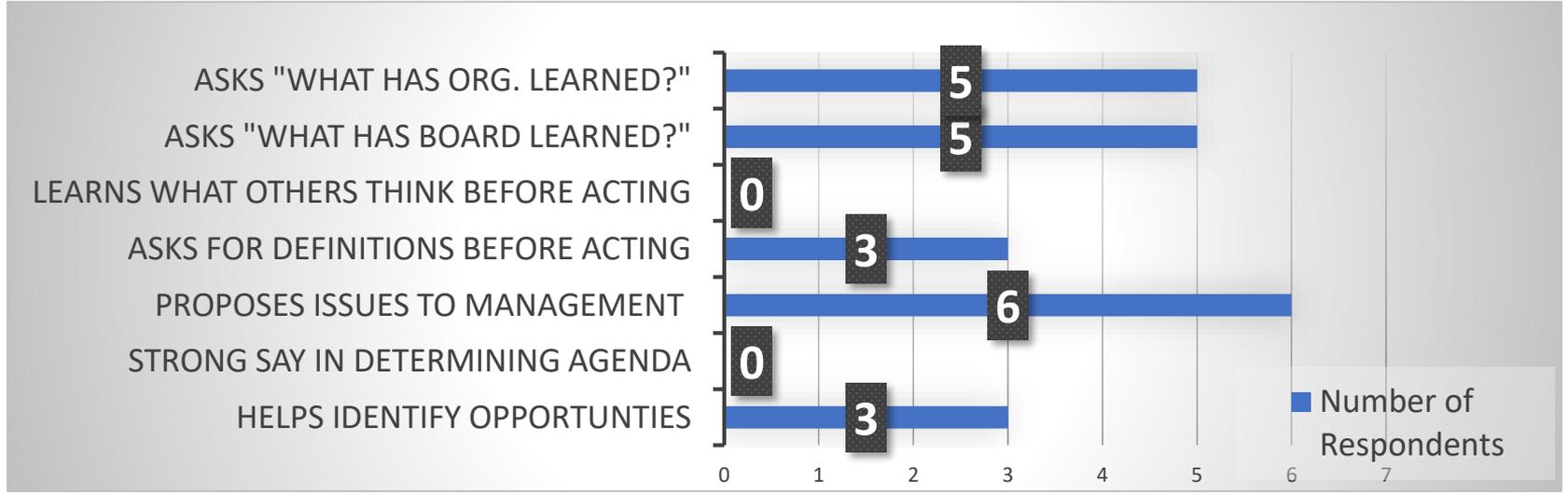


Board Experience





Interviewees Understanding/Behaviors of Generative Thinking





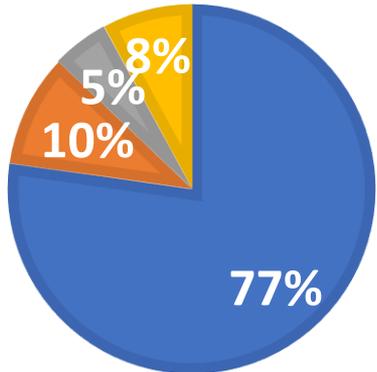
Composition



Literature

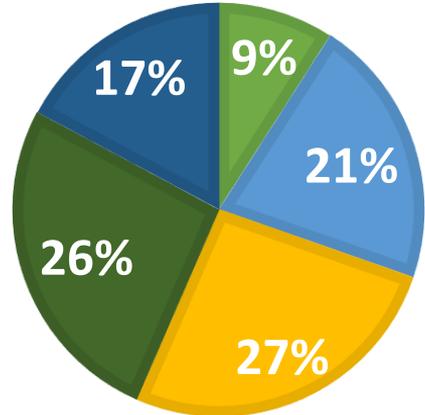
RACE

- Caucasian
- African American
- Hispanic
- Other



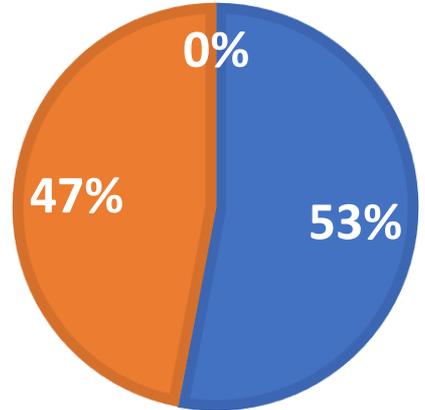
AGE

- 21-35
- 35-44
- 45-54
- 55-64
- 65+



GENDER

- Female
- Male
- Non-Binary





Literature

- Executives are more dissatisfied than board chairs
- All-white boards may struggle to change
- Some boards are reluctant to change well-established recruitment policies and practices
- Boards are willing to change but don't know where to find diverse candidates

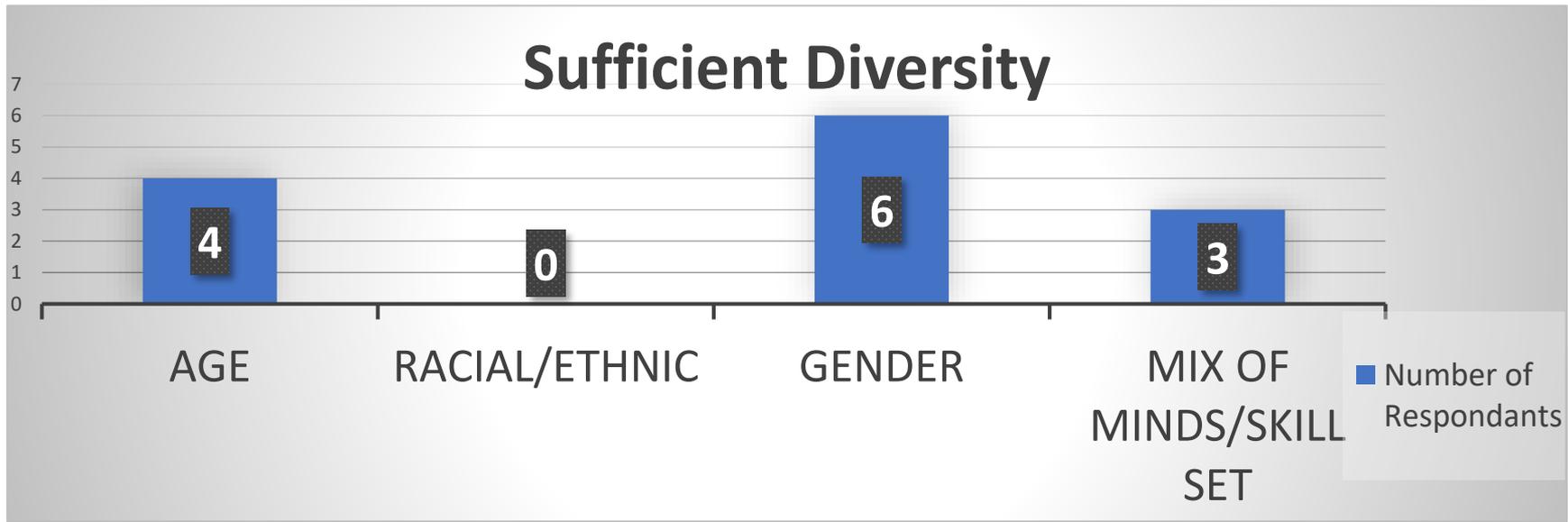


Personal Experience

- “Politics” get in the way
- Actions point toward status quo



Interview





Leadership



Literature

An effective board chair:

- Sets the tone for the board
- Enforces norms
- Engages members and manages their work
- Guides their leadership
- Leads performance evaluations
- Serves as trusted counselor to the executive leadership



Literature

Board Chair and Executive Leader Relationship
Partnership Mutual trust

Disconnected or disengaged board to the mission
Inability to leverage leadership potential of board



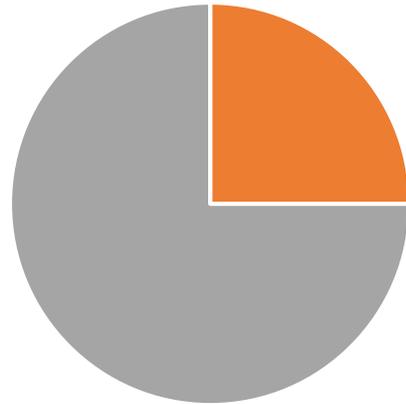
Personal Experience

- Challenge leadership (respectfully)



Interview

Board Chair Selection

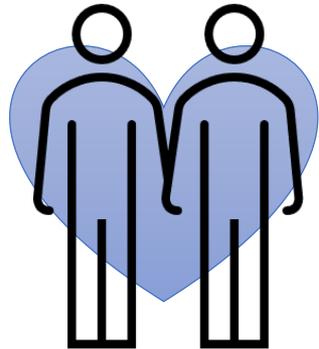


■ Uncontested Slate ■ Appointing Authority ■ Nomination/Election Process



Interview

Board Chair & Executive
Leader Relationship



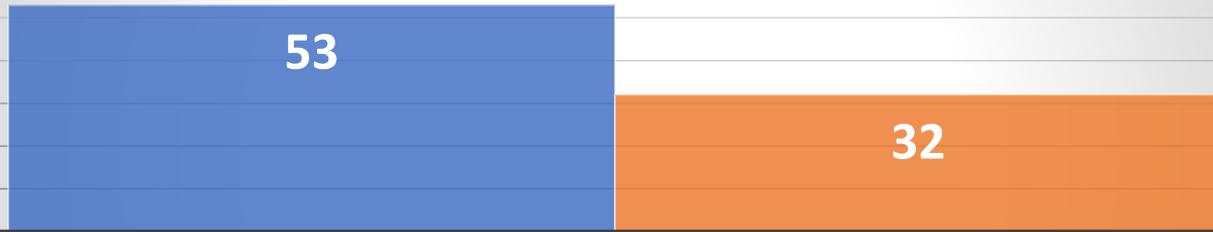


Recruitment



Literature

Difficulty in Finding Desired Individuals



PERCENT OF RESPONDANTS

■ Board Chair ■ Executive Leadership



Literature

Recruitment practice most commonly used:

- Networks (96% Executives 88% Board Leaders)

Expanded practices board leaders are open to:

- Leaders in community for which organization serves
- Referrals
- Program participants (current or former)
- Leaders from partner organizations
- Advertised board openings / Headhunters



Personal Experience

- Leader in the community for which the organization served
- Develop mentor/mentee program



Interview

3 out of 8 = strategic and thoughtful recruitment process

8 out of 8 = gaps identified

6 out of 8 = profiled "ideal" future board

8 out of 8 = noted difficulties in finding desirable members

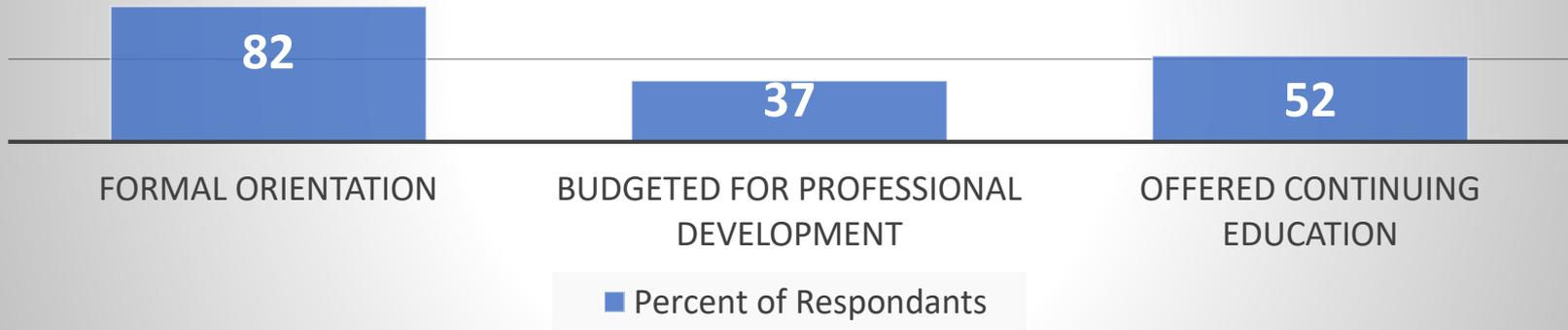


Orientation & Education



Literature

Identified Markers in Creating Understanding & Engagement





Literature

It is suggested that board education should be ongoing and continuous, utilizing a variety of mechanism such as:

- Board and committee meeting presentation and discussions
- Web portals
- Distribution of industry or internal articles
- Board newsletters
- Annual reports
- System and/or board retreats
- Conferences



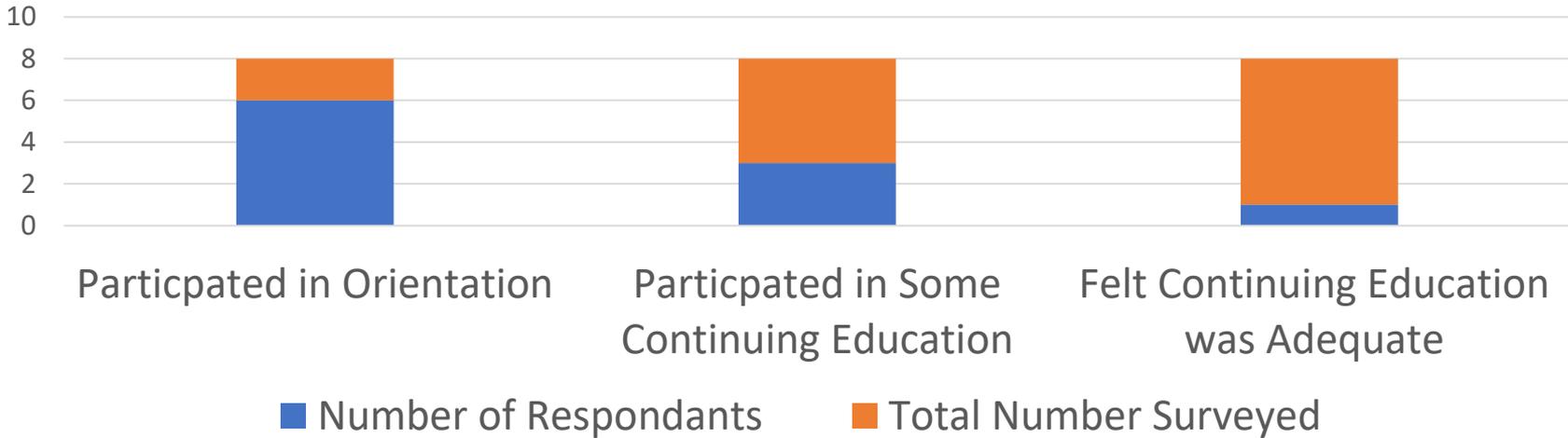
Personal Experience

- Roles and Responsibilities (Job Description)



Interview

Orientation & Education Results





What does all this mean?



Frameworks for Analysis

- Lifecycle
- Human Resources
- Political



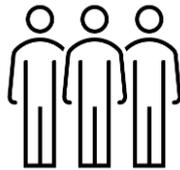
Composition

There are two schools of thought when it comes to the relationship between people and organizations:

Tools



People





Composition

Create meaning and purpose

Performance = Ability x Motivation



Leadership

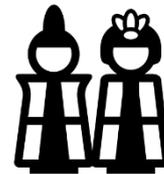
- Adaptive Leaders = Acceptance of Generative Thinking
- But how we select those leaders could create an imbalance



Connections



Longevity



Status



Leadership

- Relationship of mutual **TRUST**
- Balance (or imbalance) of power
 - Authority
 - Information
 - Expertise
 - Reputation
 - Alliances and networks
 - Access
- Board Chair must ensure:
 - Opportunity for varied voices – not drowned out by one voice
 - Lead without overpowering or staying silent



Recruitment

- Create purpose through impact and engagement
- Develop clear goals
- Identify skill sets needed based on strategic plan
- Think beyond direct connection to mission
 - What are their leadership experiences
 - Willingness to work hard on behalf of organization



Orientation & Education

- Nonprofit board governance may seem foreign to some so we must orient them
- An investment in developing human capital may be difficult to justify due to board members being temporary volunteers
- But it must be done to empower the board and give meaning to their participation



What actions can you take?



Recommendations for Composition

- Examine the culture
 - Structures and processes
 - Values
 - Basic underlying assumptions
- Guide a culture change
 - Establish sense of urgency
 - Form a powerful coalition
 - Create a change vision
 - Communicate the vision
 - Empower others to act on the vision
- Plan for an create short term wins
- Consolidate improvement and produce more change
- Make change stick



Recommendations for Leadership

- Create accountability to balance the power
 - Performance assessments
- Create opportunities for mentorship (an advocate for new board members) ensuring “all” voices are heard



Recommendations for Recruitment

- Create a job description; clearly define roles and responsibilities
- Define what qualifications are needed in board members
- Develop a plan for identification and cultivation of those you want
- Develop a process for nomination
- To connect with diverse candidates use varied tactics
 - Post board searches on sites for individuals that have passion for volunteering (volunteermatch.org and boardmemberconnect.com) or sites with broader range of candidates (LinkedIn or Indeed)
 - Connect with civic associations such as National Black Chamber of Commerce, the Hispanic National Bar Association, and the National Black MBA Association
 - Engage staff members involved in external outreach
 - Challenge every board member to be intentional and an ambassador for diverse board candidates



Recommendations for Orientation & Education

- Budget for continuing education
- Think creatively to minimize expenses
 - Group together staff and board trainings
 - Seek out free/discounted trainings such as webinars
 - Executive staff led trainings
 - Partner with like-sized or similar mission-based organizations and cost share
- Measure performance to show ROI



A **generative thinking board** is necessary for reinventing the broken system, challenging its goals, and identifying the organization's larger purpose and meaning, and an action that can advance the team to be one that is defined as high-performing.





Thank You!

Julie Fink, MS, CFRE

Julie.fink2@Jefferson.edu or Julie_fink@Comcast.net

609-226-9533

LinkedIn @JulieFink